



**May 2002**

**UNITED STATES ARMY  
SOLDIER SUPPORT INSTITUTE  
ADJUTANT GENERAL SCHOOL**

**REVIEW A COMPLETED  
NONCOMMISSIONED OFFICER  
EVALUATION REPORT**

**LESSON PLAN**

**CBC5H105 / REVIEW A COMPLETED NONCOMMISSIONED OFFICER EVALUATION REPORT****SECTION I. ADMINISTRATIVE DATA****All Courses  
Including This  
Lesson**

<u>Course Number</u>	<u>Course Title</u>
500-75H3O/805C-75H3O	Personnel Services Sergeant Basic Non-Commissioned Officer Course (BNCOC)
500-71L3O/805C-71L3O	Administrative Specialist Basic Non-Commissioned Officer Course (BNCOC)

**Task(s)  
Taught(\*) or  
Supported**

<u>Task Number</u>	<u>Task Title</u> <u>Individual</u>
805C-75H-3423 (*)	REVIEW A COMPLETED NONCOMMISSIONED OFFICER EVALUATION REPORT

**Reinforced  
Task(s)**

<u>Task Number</u>	<u>Task Title</u>
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**Academic  
Hours**

The academic hours required to teach this TSP are as follows:

	<u>Resident Hours/Methods</u>
	2.8 / Conference / Discussion
	1. / Practical Exercise (Written)
Test	1.
Test Review	.2
Total Hours:	5.0

**Prerequisite  
Lesson(s)**

<u>Lesson Number</u>	<u>Lesson Title</u>
None	

**Clearance  
Access**

Security Level: Unclassified  
Requirements: There are no clearance or access requirements for the lesson.

**References**

<u>Number</u>	<u>Title</u>	<u>Date</u>	<u>Additional Information</u>
AR 623-205	Enlisted Evaluation Reporting System	17 Dec 01	
MILPER MSG 02-122	PROCESSING NCO-ERS WITH GAPS IN REPORTING PERIODS (UPDATE)		
MILPER MSG 02-122	PROCESSING NCO-ERS WITH GAPS IN REPORTING PERIODS (CLARIFICATION)		

**Student Study Assignments**

None

**Instructor Requirements**

One (1) Certified Instructor.

**Additional Support Personnel Requirements**

None

**Equipment Required for Instruction**

<u>Name</u>	<u>Quantity</u>	<u>Expendable</u>
Dry erase board	1	No
Dry erase markers	1	Yes
Dry eraser	1	Yes
Computer	1	No
LCD	1	No
Pointer	1	No

**Materials Required****Instructor Materials:**

A completed NCOER (DA Form 2166-8) and personal data sheet in a Student Handout, Student Extract (AR 623-205, (Noncommissioned Officer Evaluation Reporting System), MILPER MSG 02-114 and MILPER MSG 02-122), PowerPoint presentation, and standard office supplies and equipment.

**Student Materials:**

A completed NCOER (DA Form 2166-8) and personal data sheet in a Student Handout, Student Extract (AR 623-205, (Noncommissioned Officer Evaluation Reporting System), MILPER MSG 02-114 and MILPER MSG 02-122), and standard office supplies and equipment.

**Classroom, Training Area, and Range Requirements**

General All - Purpose Classroom, 12 positions

**Ammunition Requirements**

<u>Name</u>	<u>Student Qty</u>	<u>Misc Qty</u>
None		

**Instructional Guidance**

**NOTE:** Before presenting this lesson, instructors must thoroughly prepare by studying this lesson and identified reference material.

**Proponent Lesson Plan Approvals**

<u>Name</u>	<u>Rank</u>	<u>Position</u>	<u>Date</u>
Highbarger, Robyn K.	SSG	Writer-Developer	28 May 02
Coleman, Tony	GS11	Quality Control	29 May 02
Taylor, Robert	SFC	NCOIC, TDD	29 May 02
Jones, Anita	GS13	Chief, TDD	29 May 02

## SECTION II. INTRODUCTION

Method of Instruction: <u>Conference / Discussion</u>
Instructor to Student Ratio is: <u>1:12</u>
Time of Instruction: <u>15 mins</u>
Media: <u>Viewgraphs</u>

### Motivator

**NOTE:** Show Viewgraph 1 while introducing the title to the students.

Personnel managers and leaders are responsible for ensuring that all forms and documents are properly completed. Each of you must take a personal interest and be involved with the evaluation system since every enlisted soldier's career, including your own, depends on these evaluations. It is our responsibility to ensure that the NCOER remains an accurate and useful soldier evaluation tool.

**NOTE:** There are four viewgraphs for the Terminal Learning Objective. There is one for the action, one for the conditions, and two for the standards. As you read the Terminal Learning Objective to the students, advance through each viewgraph accordingly.

**NOTE:** Show Viewgraphs 2-4: Terminal Learning Objective.

**NOTE:** Inform the students of the following Terminal Learning Objective requirements.

At the completion of this lesson, you [the student] will:

### Terminal Learning Objective

<b>Action:</b>	Review a Completed Noncommissioned Officer Evaluation Report (NCOER)
<b>Conditions:</b>	Given the requirement to review the completed NCOER (DA Form 2166-8) and access to AR 623-205, MILPER MSG 02-114, MILPER MSG 02-122, and standard office supplies and equipment.
<b>Standards:</b>	Verify that Parts I, II, III, IV, and V of the NCOER are administratively correct IAW AR 623-205, MILPER MSG 02-114, and MILPER MSG 02-122

### Safety Requirements

No food or drink is allowed near or around electrical equipment due to possible electrical shock or damage to equipment. Exercise care in personal movement in and through area; avoid all electrical cords and associated wiring. In the event of an electrical storm you will be instructed to power down the equipment.

Apply local SOP for Safety, Risk Assessment, and Environmental impact for training conducted in facilities/areas other than those indicated in the TSP.

### Risk Assessment Level

Low

### Environmental Considerations

Dispose of all recyclable in designated areas.

### Evaluation

Students will be tested to measure their ability to accurately verify an NCOER for completeness and accuracy. Students will have one class period (50 minutes) to complete this examination. A passing score of 70% must be obtained.

**Instructional  
Lead-In**

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The DA Form 2166-8 is used by the rating officials to provide the Army with a brief, clear assessment of the rated NCO's duty performance, professionalism, and potential. The form also provides evaluation information to ensure that sound personnel management decisions can be made, and that an NCO's potential can be fully developed. It will be your job as a Personnel Services Sergeant to ensure that these forms are properly filled out and processed.

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### SECTION III. PRESENTATION

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**1. Learning Step / Activity 1. Verify that the information entered in Part I of the NCOER is correct.**

Method of Instruction: Conference / Discussion  
Instructor to Student Ratio: 1:12  
Time of Instruction: 45 mins  
Media: Small Group Instruction (SGI)

- a. DA Form 2166-8.** The DA Form 2166-8 is used to provide the Department of the Army (DA) with a brief and clear assessment of the rated NCO's duty performance, professionalism, and potential.

**b. Computation of rated and non-rated months.**

- (1) Identify the beginning month. The beginning month is always the month following the ending month of the last report, except when:
- (a) An NCO's first report begins on the effective date of promotion to sergeant.
  - (b) Reversion to NCO status after serving as a commissioned or warrant officer for 12 months or more.
  - (c) Re-entry on active duty after a break in enlisted service of 12 months or more.
  - (d) Date of the Army Board for Correction of Military Records (ABCMR) memorandum that approves reinstatement of a promotion.

**NOTE:** Explain the following example:

A NCO received her annual NCO-ER for the period of 1 April 2004 (2004 04) through 31 March 2005 (2005 03). The beginning month for her next NCO-ER is 2005 04.

**NOTE:** Refer students to para 3-7d(7).

- (2) Identify the ending month (thru date). The ending month is always the month of the event that generates the report regardless of when the event occurs during that month (e.g., 1st day, 10th day, or 28th day).

**NOTE:** Explain the following example:

An NCO previously received a report ending in June 2004 and subsequently has a change of rater on 2 October 2004. The beginning month will be July 2004 (2004 07) and the ending month would be October 2004 (2004 10).

- (3) Now that we have identified the beginning and ending months, we are ready to compute the number of calendar months in the rating period. To calculate these months simply total the number of months from the beginning month through the ending month.

**NOTE:** Explain the following example:

A NCO receives a NCO-ER with the period covered from 2004 06 through 2004 12. The total number of months on his/her report is seven (7) months.

(4) Computation of rating period. To this point, we have discussed how to determine the beginning date, the ending (thru date), and how to compute the total number of months. We will now cover non-rated time on the NCO-ER.

**NOTE:** Refer students to Tables 3-2 thru 3-4.

(5) The total number of nonrated months during a report period will be computed as follows:

- (a) Determine the total days in the reporting period during which the NCO was in a nonrated status.
  - 1- Periods during which the NCO is in a status listed in Table 3-3 are nonrated and will not be counted toward a rating period or rater/senior rater qualification. Refer students to Table 3-3 and cover the reasons and definitions for nonrated periods.
  - 2- Convert the total nonrated days to nonrated months by using Table 3-4. Refer students to Table 3-4 and explain that how to convert nonrated days to months using this table.

**NOTE:** The table stops at 165 nonrated days. Do not attempt to continue the table past this point.

- (b) Identify the nonrated time during the entire report period. The day a soldier enters a nonrated status (e.g., PCS leave, school, patient, AWOL), is a nonrated day, regardless of the effective time of change. The day the soldier returns from a nonrated status, regardless of the effective time is a rated day. If more than one period of nonrated time exists during the entire report all nonrated days are added together.

**NOTE:** Refer students to Table 3-4.

- (c) To determine the total number of rated months, subtract the total nonrated months from the total months in the rating period.

**NOTE:** Read each situation to the class and give the students time to solve examples 1-3.

#### EXAMPLE 1

A NCO-ER report period is from 2004 01 through 2004 10 (10 months). The NCO was in BNCOC for 52 days during this rating period. Using Table 3-4 convert the total number of nonrated days to nonrated months and determine to number of rated months.

**NOTE:** Answer for example 1:

The 52 days of BNCOC will convert to 2 nonrated months (46 days to 75 days). Thus, the rated number of months will be 8.

### EXAMPLE 2

The NCO-ER report period is from 2004 03 through 2004 08. The soldier was TDY from 10 March to 25 March. The soldier returned to duty on 25 March. Calculate the number of nonrated days and using Table 3-2 convert the total number of nonrated days to nonrated months and determine the number of rated months.

**NOTE:** Answer for example 2:

The TDY period of 10 March through 25 March equals 15 days. However, TDY is rated (para 3-31), thus the number of rated months will be 6.

### EXAMPLE 3

The soldier's last end date on her previous NCO-ER was 2004 10. Her new ending month will be 2005 10. She signed out on 9 October 2004 to attend BNCOC. She returned on 21 December 2004. She also was hospitalized on 5 June 2005 and returned to duty on 11 June 2005. What is the total number of rated months?

**NOTE:** Answer for example 3:

The period of TDY should be 50 days. There are 30 nonrated days in November and 20 nonrated days in December. Do not count the days in October since they are outside the rating period. She also has 6 nonrated days for hospitalization. Remember, you count the first day (5 June is a nonrated day) and do not count the last day (11 June). Add the nonrated periods together. 56 nonrated days will convert into two nonrated months. The entire reporting period is 12 months (2004 11 thru 2005 10) minus 2 nonrated months equals 10 rated months.

**NOTE:** Refer to paragraph 3-7c.

- (6) The minimum authorized period for an NCO-ER is 90 days. February is considered as having 30 days except for Relief-for-Cause Reports, Senior Rater Option, and Sixty-Day Option Reports.

**NOTE:** Give the following examples to the class.

### EXAMPLE 1

An NCO previously received her NCO-ER ending in July 2004 and departs on permanent change of station (PCS) on 18 October 2004. What is the number of rated days for this report?

**NOTE:** Answer to example 1:

The rated months would cover August (2004 08) through October (2004 10), however the number of rated days is 78 (31 days in August, 30 days in September, and 17 days in October). No NCO-ER would be required because the period covered is less than 90 days.

### EXAMPLE 2

A NCO previously received his NCO-ER ending in January 2005. The NCO's rater departs on permanent change of station (PCS) on 7 July 2005. What is the number of rated months for this report?



**NOTE:** Answer to example 2:

The rated period would cover February (2005 02) through July (2005 07), however the number of rated months is 5 (July would be non-rated).

**NOTE:** Have students break into small groups and using the items from their Student Handouts, review Part I of the completed NCOER (annual report) and compare it with the soldier's personal data sheet. Have the groups reconvene and lead a larger group discussion regarding what information should be verified. Make sure the following points are covered:

**c. Performance steps.** Using the soldier's DA Form 2166-8 and personal data sheet handouts, check the soldier's data and perform the following steps when reviewing Part I of the DA Form 2166-8, annual report:

- (1) Verify the NCO's name, social security number (SSN), rank, date of rank, and primary MOS code (PMOSC) are entered correctly in blocks a through e.
- (2) Verify the NCO's unit, organization, station, zip code or Army Post Office (APO), and Major Command (MACOM) in block f, for accuracy.
- (3) Using Table 3-1, verify block g (REASON FOR SUBMISSION) for correct report code and report title.
- (4) Verify the year and month of the beginning date and the year and month of the thru date of the evaluation period covered by this NCOER are entered correctly in block h.
- (5) Verify the actual number of rated months covered by this NCOER has been computed correctly and entered in block i.
- (6) Verify the correct nonrated codes from Table 3-3, if any, have been recorded in block j.
- (7) Verify the number of authorized enclosures, if any, included with the NCOER has been correctly entered in block k. Block k should be left blank if there are no enclosures.
  - (a) Verify that any enclosures do not exceed one page per enclosure and have been prepared on 8 1/2 X 11-inch bond paper IAW AR 25-50.
  - (b) Verify that each enclosure, if any, contains the rated NCO's full name, SSN, and grade.
  - (c) Verify that each enclosure, if any, specifies the period covered by the NCOER.
  - (d) Verify the originator of any enclosure has stated a reason for its inclusion with the NCOER and has signed the enclosure.
- (8) Verify the correct two-place MACOM assignment code for the rated NCO is entered in block n.
- (9) Verify the correct four-position alphanumeric personnel service center (PSC) code is entered in block o.

**NOTE:** Conduct a check on learning and summarize the learning activity.

**CHECK ON LEARNING:**

- Question: What is the purpose of DA Form 2166-8?
- Answer: Used to provide DA With performance and potential assessment of each rated NCO and provides evaluation information to ensure that sound personnel management decisions can be made and that an NCO's potential can be fully developed. - para 3-6
- Question: What are the rating period and the number of rated months for an NCO whose last NCOER is 2005 05 and their current rater is departing 10 October 2005?
- Answer: 2005 06 2005 10 4 rated months - Table 3-2
- Question: What are the non-rated codes for ordinary leave and lack of rater qualification?
- Answer: Ordinary Leave is rated time – Lack of Rater Qualification is Q. – Table 3-3
- Question: What is the rating period for an NCO whose thru date of last NCOER is 2004 08 and changes raters 30 June 2005?
- Answer: 2004 09 thru 2005 06 - Table 3-2
- Question: What is the minimum rated time an NCO must have to receive a relief-for-cause for misconduct?
- Answer: The minimum is 30 days however, it can be waived by a general officer in the chain of command or an officer having general courts-martial jurisdiction over the relieved NCO. - para 3-32c.(5)
- Question: What are you verifying on the enclosures in block "k" of DA Form 2166-8?
- Answer: NCO's full name, SSN, grade, the period of the report, signature of the originator, and the reason for the enclosure. – para 3-24
- Question: What information do you verify in block "o", part I of DA Form 2166-8?
- Answer: That the correct four position alphanumeric PSB Code is entered. – para 3-7

**2. Learning Step / Activity 2. Verify the information contained in Part II of the NCOER is complete and accurate.**

Method of Instruction: Conference / Discussion  
Instructor to Student Ratio: 1:12  
Time of Instruction: 15 mins  
Media: Small Group Instruction (SGI)

**NOTE:** Have students break into small groups and using the items from their Student Handouts, review Part II of the completed NCOER, annual report, and compare it with the soldier's personal data sheet. Have the groups reconvene and lead a larger group discussion regarding what information should be verified. Make sure the following points are covered:

- a. Authentication.** The following is merely background information so that as a personnel services sergeant, you can verify the NCOER has been signed and dated correctly.

- (1) Annual. An annual report will not be signed before the first day of the month following the ending month of the report.
- (2) Change of rater. This report may not be signed before the date that the change occurs. However, in the event of a permanent change of station (PCS), ETS, or retirement the report may be completed and signed up to 10 days prior to the date of departure to facilitate orderly out processing. However, the rating period is officially ended as of the date of the rater's signature.
- (3) Complete the Record. This report cannot be signed before the first day of the month following the ending month.
- (4) The Relief for Cause Report. This report may be signed at any time during the closing or the month following the report.
- (5) Senior Rater Option. This report may not be signed before the date that the change occurs. However, in the event of a permanent change of station (PCS), ETS, or retirement the report may be completed and signed up to 10 days prior to the date of departure to facilitate orderly out processing. However, the report cannot be signed before the rating period ends.
- (6) Sixty-Day Rater Option. This report will not be signed before the first day of the month following the ending month of the report.

**b. Performance steps.** The following represents the steps that you will exercise when processing the NCOER:

- (1) Verify the name, SSN, rank, PMOSC/Branch organization, and duty assignment for the rater, senior rater, and reviewer are entered correctly in their respective blocks (a, b, and d) by referring to the rating scheme.
- (2) Verify the senior rater obtained the rated NCO's signature or entered the appropriate statement "NCO refuses to sign" or "NCO unavailable for signature" and entered the date in block c.
- (3) Verify the rater, senior rater, and reviewer signed and dated the report in their respective blocks (a, b, and d).
- (4) Verify the reviewer placed a typed or handwritten X in the CONCUR WITH RATER AND SENIOR RATER EVALUATIONS box, or in the NONCONCUR WITH RATER AND/OR SENIOR RATER EVAL box in block e.
- (5) Verify the reviewer included an enclosure with the NCOER to explain his or her placing an X in the NONCONCUR box.

**NOTE:** Conduct a check on learning and summarize the learning activity.

**CHECK ON LEARNING:**

Question: Is an enclosure mandatory when processing an NCOER if the nonconcurrence block is marked?

Answer: Yes. – 3-8c.

Question: What should the senior rater enter if the NCO does not sign the NCOER?

Answer: "NCO refuses to sign" or "NCO unavailable for signature." - para 3-8c

Question: In the event of a PCS, up to how many days may a report be completed and signed prior to the departure date?

Answer: 10 days. - para 3-30

Question: What type of report may be signed at any time during the closing or the month following the report?

Answer: Relief for Cause Report - para 3-32c

**3. Learning Step / Activity 3. Verify the information provided by the rater in Part III of the NCOER is complete and accurate.**

Method of Instruction: Conference / Discussion  
 Instructor to Student Ratio: 1:12  
 Time of Instruction: 15 mins  
 Media: Small Group Instruction (SGI)

**NOTE:** Have your students break into small groups and using the items from their Student Handouts, review Part III of the completed NCOER and compare it with the soldier's personal data sheet. Have the groups reconvene and lead a larger group discussion regarding what information should be verified. Make sure the following points are covered:

- a. **Part III.** Part III focuses on the Duty Description section of DA Form 2166-8. Daily duties and scope must be a series of phrases starting with action words and separated by semicolons. Duty description and additional duties will be listed on the rated NCO's DA Form 2166-8-1.
- b. **Performance steps.** Perform the following steps when reviewing Part III of the completed NCOER:
  - (1) Verify the rated NCO's principal duty title and duty MOSC are recorded correctly in blocks a and b.
  - (2) Verify the rated NCO's daily duties and the scope of those duties are recorded in block c in a series of concise phrases which begin with action words and are separated by semi-colons.
  - (3) Verify the rated NCO's areas of special emphasis.
    - (a) Verify in block d areas of special emphasis consist of a list of tasks and duties which are separated by semi-colons.
    - (b) Verify 3d line of areas of special emphasis contain the email addresses for the rater, senior rater, and reviewer IAW MILPER MSG 02-114 and MILPER MSG 02-122.

- (4) Verify block e, appointed duties, are listed.
- (5) Verify the rated NCO's counseling dates are recorded in six-digit year, month, and day sequence in the appropriate boxes in block f.
- (6) Verify that in the absence of any counseling dates in block f, the senior rater entered a comment in Part V, block e, which explains why counseling of the rated NCO was not accomplished.

**NOTE:** Conduct a check on learning and summarize the learning activity.

#### **CHECK ON LEARNING:**

Question: How should a sentence begin to describe the daily duties and the scope of those duties in Block C?

Answer: With action verbs. - para 3-9b

Question: How should the counseling dates be recorded in Block F?

Answer: In six-digit year, month, day sequence. - para 3-09b

Question: What information must be entered in Section III, Block d?

Answer: Areas of special emphasis for the NCO and email addresses for the Rater, Senior Rater, and Reviewer. - para 3-9b and MILPER MSGs 02-114 and 02-122

Question: What block is used to record the NCO's daily duties and other scope of duties?

Answer: Block c. para 3-9b

#### **4. Learning Step / Activity 4. Verify the information provided by the rater in Part IV of the NCOER is complete and accurate.**

Method of Instruction: Conference / Discussion  
 Instructor to Student Ratio: 1:12  
 Time of Instruction: 15 mins  
 Media: Small Group Instruction (SGI)

**NOTE:** Have your students break into small groups and using the items from their Student Handouts, review Part IV of the completed NCOER and compare it with the soldier's personal data sheet. Have the groups reconvene and lead a larger group discussion regarding what information should be verified. Make sure the following points are covered:

Refer students to AR 623-205 paragraph 3-10 through 3-13.

**a. Part IV.** The rater will answer each question in the values (Part IVa) portion with either a typed or handwritten "X" in the YES or NO box. The rater must then explain, with bullet comments, any area where the rated NCO is particularly strong or needs improvement. Specific bullet comments are mandatory for "Excellence, Needs improvement or NO ratings.

**b. Performance steps.** Perform the following steps when reviewing Part IV of the completed NCOER:

- (1) Verify the rater entered a typed or handwritten X in black ink in either the YES or NO box of each of the seven values/NCO requirements/responsibilities in block a.

- (2) Verify the rater entered mandatory bullet comments in the space provided at the bottom of the page for each X he or she placed in a NO box of block a.
- (3) Verify that each bullet comment by the rater is short, concise, and to the point and begins with an action verb or the possessive pronouns his or her.
- (4) Verify that each comment uses "past" tense when addressing NCO's performance and/or contributions.
- (5) Verify the rater avoided using the rated NCO's name or the personal pronouns he or she in any of the comment sections of Part IV.
- (6) Verify that no comments refer to prior or subsequent NCOERs of the rated NCO to performance or incidents, which occurred before or after this particular rating period or to any punitive or administrative action being taken or planned against the rated NCO.
- (7) Verify that no comments in the NCOER refer to unverified derogatory information concerning the rated NCO or contain inappropriate or arbitrary remarks related to race, color, religion, gender, or national origin.
- (8) Verify the rated NCO's full name, SSN, and THRU DATE have been entered correctly at the top of page 2 of the NCOER.
- (9) Verify the rater moved four spaces after entering the rated NCO's name (in all caps) and entered the rated NCO's AKO email. e.g. tweedy.man@ - last portion will not be entered. MILPER Messages 02-114 and 02-122
- (10) Verify the rater placed a typed or handwritten X in the appropriate box in each of blocks b through f.
- (11) Verify the rater explained all EXCELLENCE or NEEDS IMPROVEMENT ratings in blocks b through f with specific bullet comments in the space provided on the right side of each block.
- (12) Verify the rater-entered PASS, FAIL, or PROFILE in the APFT box of block c, and the year and month of the APFT results, or the year and month the profile was given. e.g. PASS 0405; FAIL 0410; PROFILE 0502.
- (13) Verify the rater entered a bullet comment in block c to explain why he or she rated the NCO as FAIL or PROFILE or left the APFT box blank.
  - (a) "FAIL" comments should address reasons for failure and any progress made towards meeting the standard.
  - (b) "PROFILE" must have a statement describing the NCO's ability to perform assigned duties. Rater cannot state that profile hinders duty performance if the soldier has been determined fit by a MOS Medical Retention Board.
  - (c) Blank APFT boxes require a statement explaining this absence. The statement "o exempt from APFT requirement in accordance with AR 40-501" will be entered if the soldier did not take the APFT due to pregnancy.
- (14) Verify the rater completed the HEIGHT/WEIGHT box of block c by recording the rated NCO's verified height and weight as of the rater's signature date and denoting the rated NCO's compliance or noncompliance (YES or NO) with the provisions of AR 600-9.

- (a) Verify the rater entered a bullet comment in block c to explain a noncompliance rating or to explain why the HEIGHT/WEIGHT box is left blank.
- (b) Verify the rater did not enter a bullet comment in block c to explain the basis of a yes entry in the HEIGHT/WEIGHT box for a rated NCO who exceeds the Weight for Height Table in AR 600-9, but through a body fat determination is found to be in compliance with the body fat standards of AR 600-9.
- (15) Verify that each comment is preceded by a lower case o (bullet), that there is no more than one bullet comment per line, and that all comments are double-spaced between bullets.
- (16) Verify that Parts IV a-f and Ve of the NCOER do not contain an excessive use of capital letters, underlining, italics, exaggerated margins, or similar techniques.
- (17) Verify the NCOER is intact and has not been taped or stapled.

**NOTE:** Conduct a check on learning and summarize the learning activity.

#### **CHECK ON LEARNING:**

Question: Where should comments be placed to explain a FAIL or PROFILE rating in the APFT box?

Answer: Block IVc. - para 3011b

Question: What ratings by the rater in Part IV must be supported by bullet comments?

Answer: Any EXCELLENCE or NEEDS IMPROVEMENT ratings. - para 3-10g

Question: What comment(s) should not be entered in the NCOER?

Answer: Derogatory information or remarks related to race, color, religion, gender or ethnicity. Comments based solely on an NCO's marital status. - para 3-17 through 3-19

#### **5. Learning Step / Activity 5. Verify the information provided by the rater and senior rater in Part V of the NCOER is complete and accurate.**

Method of Instruction: Conference / Discussion  
 Instructor to Student Ratio: 1:12  
 Time of Instruction: 15 mins  
 Media: Small Group Instruction (SGI)

**NOTE:** Have your students break into small groups and using the items from their Student Handouts, review Part V of the completed NCOER and compare it with the soldier's PERSONAL DATA SHEET. Have the groups reconvene and lead a larger group discussion regarding what information should be verified. Make sure the following points are covered:

- a. **Part V.** Part V of DA Form 2166-8 covers the overall performance and potential of the person under review. In Part V(a), the rater places one typed or handwritten "X" (in black ink) in the appropriate box. NCOs receiving one or more NEEDS IMPROVEMENT ratings in Parts IV(b-f) cannot receive a rating of "Among the best."

**b. Performance steps.** Perform the following steps when reviewing Part IV of the completed NCOER:

- (1) Verify the rater entered a typed or handwritten X in the appropriate box in block a.
- (2) Verify a NCO who is rated as being AMONG THE BEST in block a has not been rated as NEEDS IMPROVEMENT in blocks b through f in Part IV.
- (3) Verify the rater listed in block b at least two and no more than three future duty positions (job titles) in which the rated NCO could best serve the Army at his or her current or next higher grade. If soldier was reduced, the rater may enter duty positions, which parallel the lower grade.
- (4) Verify the senior rater evaluated the NCO's overall performance and potential for promotion and/or service in positions of greater responsibility by placing Xs in the appropriate boxes in blocks c and d.
  - (a) Verify the senior rater included bullet comments in block e to expand upon his or her overall performance/potential ratings in blocks c and d.
  - (b) Verify the senior rater addressed a MARGINAL rating by the rater in block a and Fair or Poor ratings by himself or herself (blocks c and d) with specific bullet comments in block e.
  - (c) Verify the senior rater included a bullet comment in block e which states, "Senior rater does not meet minimum qualifications," to explain that he/she does not meet minimum rating time requirements for the evaluation on the rated NCO. Parts Vc and Vd will not be completed when this comment is entered.

**NOTE:** Conduct a check on learning and summarize the learning activity.

**CHECK ON LEARNING:**

Question: How many future duty positions can be listed in block b?

Answer: At least two and no more than three. - para 3-13b

Question: Specifically, what ratings must be addressed in block Ve?

Answer: A MARGINAL rating by the rater in block a and Fair or Poor ratings in part Vc.  
A bullet comments to expand upon his or her overall performance/potential ratings in blocks c and d.  
Lack of counseling dates  
Lack of Senior Rater Qualifications- para 3-13d Table 3-7 Step 5c Figure 3-2

Question: When can an NCO not receive a rating of "Among the Best?"

Answer: When he or she has received one or more "Needs Improvement" ratings.  
- para 3-13a



Question: Are bullet comments from the senior rater mandatory in Part Ve?

Answer: Yes. - para 3-13d

Question: What should be verified once an NCO is rated as being "Among the Best" in block a?

Answer: That he or she has not received a "NEEDS IMPROVEMENT" in blocks b through f in Part IV. - para 3-13a

**6. Learning Step / Activity 6. Distribute the DA Form 2166-8 correctly and expeditiously.**

Method of Instruction: Conference / Discussion  
Instructor to Student Ratio: 1:12  
Time of Instruction: 15 mins  
Media: Small Group Instruction (SGI)

**NOTE:** Have your students break into small groups and using the items from their Student Handouts, Review how the NCOER should be distributed. Have the groups reconvene and lead a larger group discussion. Make sure the following points are covered:

- a. **Background.** Ensuring the NCOER is delivered expeditiously and is a vital step in the entire NCOER process.
- b. **Performance steps.** Perform the following steps in completing your NCOER review:
  - (1) Verify the Personnel Services Battalion (PSB) representative initials block m in black ink.
  - (2) Verify that a copy of the completed NCOER and copies of any authorized enclosures are handed to the rated NCO or forwarded to him or her.
    - (a) Verify that a copy of the completed NCOER, and copies of any authorized enclosures are forwarded in a sealed envelope to the rated NCO via the distribution center or first class mail when it could not be hand delivered to him or her.
    - (b) Verify that when a soldier refuses to sign a report or receives a Relief-for-Cause report, the copy of the completed NCOER is either hand delivered or sent by Certified Mail.
    - (c) Verify that a copy of the completed NCOER is sent to the forwarding address or gaining command of a soldier whom departs the command before receiving a copy.
  - (3) Verify that the original of the completed NCOER and any authorized enclosures are forwarded intact to the U.S. Army Enlisted Records and Evaluation Center (USAEREC).
    - (a) Verify the NCOER is placed in a large envelope with cardboard backing to ensure safe mailing.
    - (b) Verify the envelope is sealed and addressed to the Commander, USAEREC, ATTN: PCRE-RE, 8899 East 56<sup>th</sup> Street, Indianapolis, IN 46249-5301.

- (d) Verify the envelope is forwarded to USAEREC via *first-class mail* in time to reach its destination not later than 60 days after the ending month of the NCOER. Certified and registered mail are only to be used for NCOERs containing classified materials.

**NOTE:** Conduct a check on learning and summarize the learning activity.

**CHECK ON LEARNING:**

Question: What rules apply to placing the “X” in the appropriate boxes?

Answer: Black ink or typewritten – being consistent throughout report. - para 3-10b

Question: What action is taken once a completed NCOER cannot be hand delivered to the NCO?

Answer: A copy and authorized enclosures is forwarded in a sealed envelope or first-class mail.  
- para 3-36

Question: What action is taken if an NCO refuses to sign the report and could not be hand delivered?

Answer: A copy and authorized enclosures if forwarded via certified mail to the NCO. - para 3-36

**7. Learning Step / Activity 7. Practical Exercise**

Method of Instruction: Practical Exercise (Written)  
Instructor to Student Ratio: 1:12  
Time of Instruction: 50 mins  
Media: None

Distribute the Practical Exercise and the Practical Exercise Supplement.

**NOTE:** Conduct a check on learning and summarize the learning activity.

**8. Learning Step / Activity 8. Test**

Method of Instruction: Test  
Instructor to Student Ratio: 1:12  
Time of Instruction: 50 mins  
Media: None

Distribute the Performance Test and the Performance Test Supplement.

**NOTE:** Conduct a check on learning and summarize the learning activity.

**9. Learning Step / Activity 9. Test Review**

Method of Instruction: Test Review  
Instructor to Student Ratio: 1:12  
Time of Instruction: 10 mins  
Media: -None-

## SECTION IV. SUMMARY

Method of Instruction: <u>Conference / Discussion</u>
Instructor to Student Ratio is: <u>1:12</u>
Time of Instruction: <u>5 mins</u>
Media: <u>None</u>

### Review / Summarize Lesson

During this lesson, you learned how to review the NCOER. We have discussed its purpose and use and what to check for in each block and section. The key to ensuring the value of the NCOER rests with each of you. You must take a personal interest in, and be involved with the system since every enlisted soldier's career, including your own, depends on these evaluations. We are responsible for ensuring that the NCOER remains an accurate and useful soldier evaluation tool.

### Check on Learning

Conduct a check on learning and summarize the lesson.

Question: Which blocks on the DA Form 2166-8 do you verify the NCO's SSN, rank, date of rank and primary MOS code?

Answer: Blocks a through e. - para 3-7

Question: What is entered in block e of DA Form 2166-8 if the NCO's signature is unobtainable?

Answer: "NCO refuses to sign" or "NCO unavailable for signature".  
- para 3-8

Question: Which block in Part V explains why counseling of the rated NCO was not accomplished?

Answer: Block f. - Figure 3-2

Question: You are reviewing Part IV of a completed NCOER. What should be entered at the top of page 2?

Answer: Rated NCO's full name (all caps), SSN, THRU DATE, and AKO email address. - Figure 3-2 and MILPER MSGs 02-114 and 02-122

**SECTION V. STUDENT EVALUATION**

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**NOTE:** Describe how the student must demonstrate accomplishment of the TLO standard. Refer student to the Student Evaluation Plan.

**Testing  
Requirements**

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**NOTE:** Rapid, immediate feedback is essential to effective learning. Schedule and provide feedback on the evaluation and any information to help answer students' questions about the test. Provide remedial training as needed.

**Feedback  
Requirements**